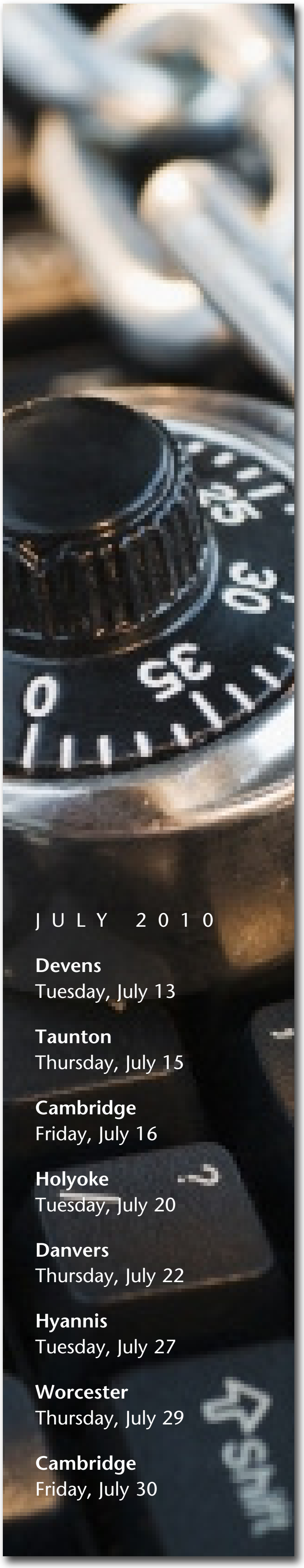
MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM

MyTRS Training

For Security Administrators



JULY 2010

Devens
Tuesday, July 13

Taunton
Thursday, July 15

Cambridge
Friday, July 16

Holyoke
Tuesday, July 20

Danvers
Thursday, July 22

Hyannis
Tuesday, July 27

Worcester
Thursday, July 29

Cambridge
Friday, July 30

AGENDA

2:45 – 3:30 p.m.

Part 1: Managing existing users

- Day One in MyTRS
- Ongoing maintenance

Part 2: Adding new employer users

- Adding an existing MyTRS contact as a user
- Adding a new MyTRS user who is not already a contact

MTRS PRESENTERS AND STAFF

Mary Ellen Bernier, Service Representative, Employer Services
Mary Lynn Chu, Service Representative, Employer Services
Christine Connell, Service Representative, Employer Services
Lachelle Drayton, Service Representative, Employer Services
Robert George, Employer Services Supervisor, Employer Services
David Harbison, Senior Service Representative, Employer Services
Kathleen Kreatz, Service Representative, Employer Services
Shirley Kwan, Senior Account Analyst, Employer Services
Cam Luu, Senior Account Analyst, Employer Services
Sean Neilon, Assistant Executive Director
Thomas O'Connell, Service Representative, Employer Services
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Joan Schloss, Executive Director
Marybeth Shaughnessy-Newell, Compliance Officer

VITECH, INC. STAFF

Irene Gordon, Associate Director of Educational Services
Mike DaCosta, Training Lead

MTRS
MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM

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Agenda

Part 1 Managing existing employer users

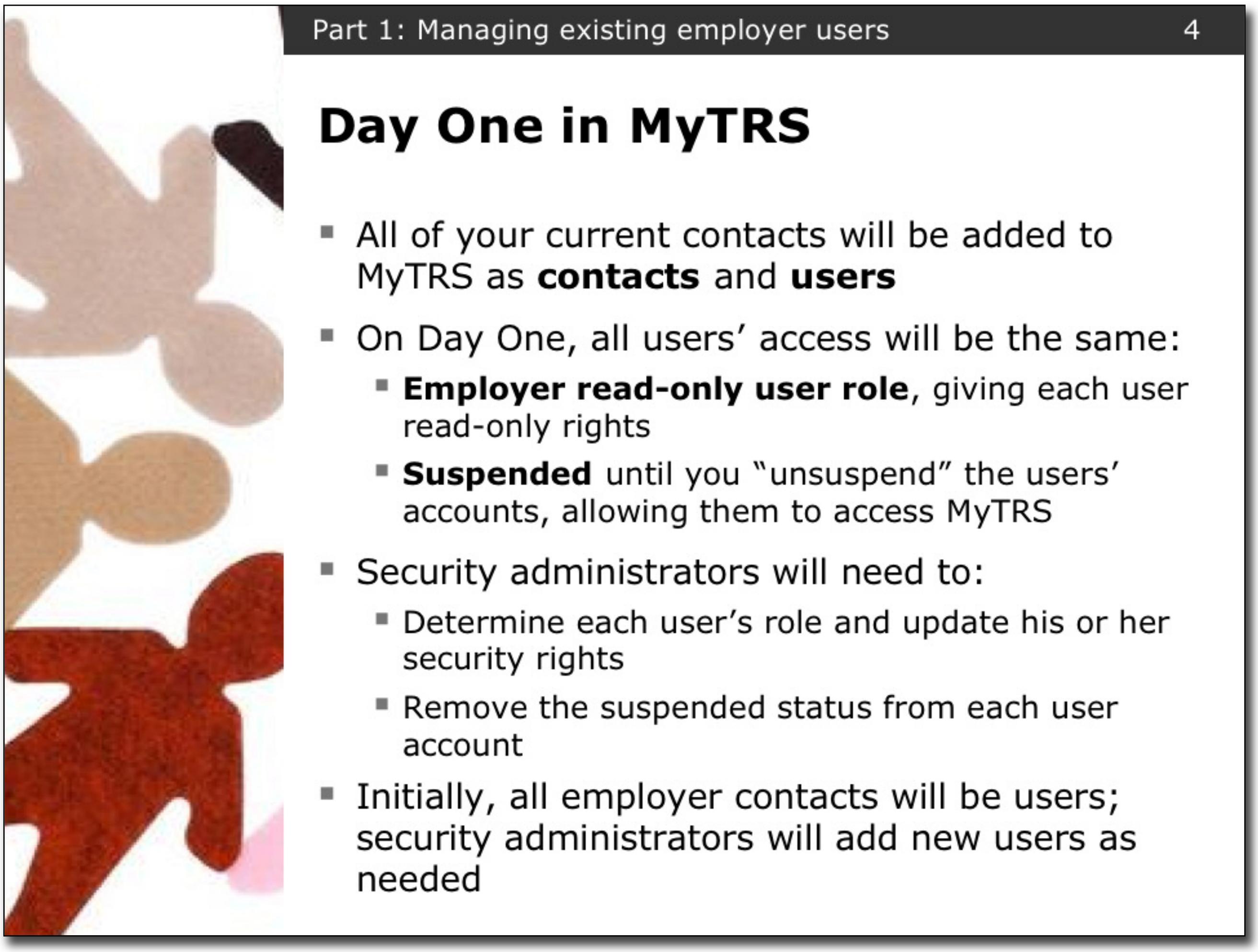
- Day One in MyTRS
- Ongoing maintenance

Part 2 Adding new employer users

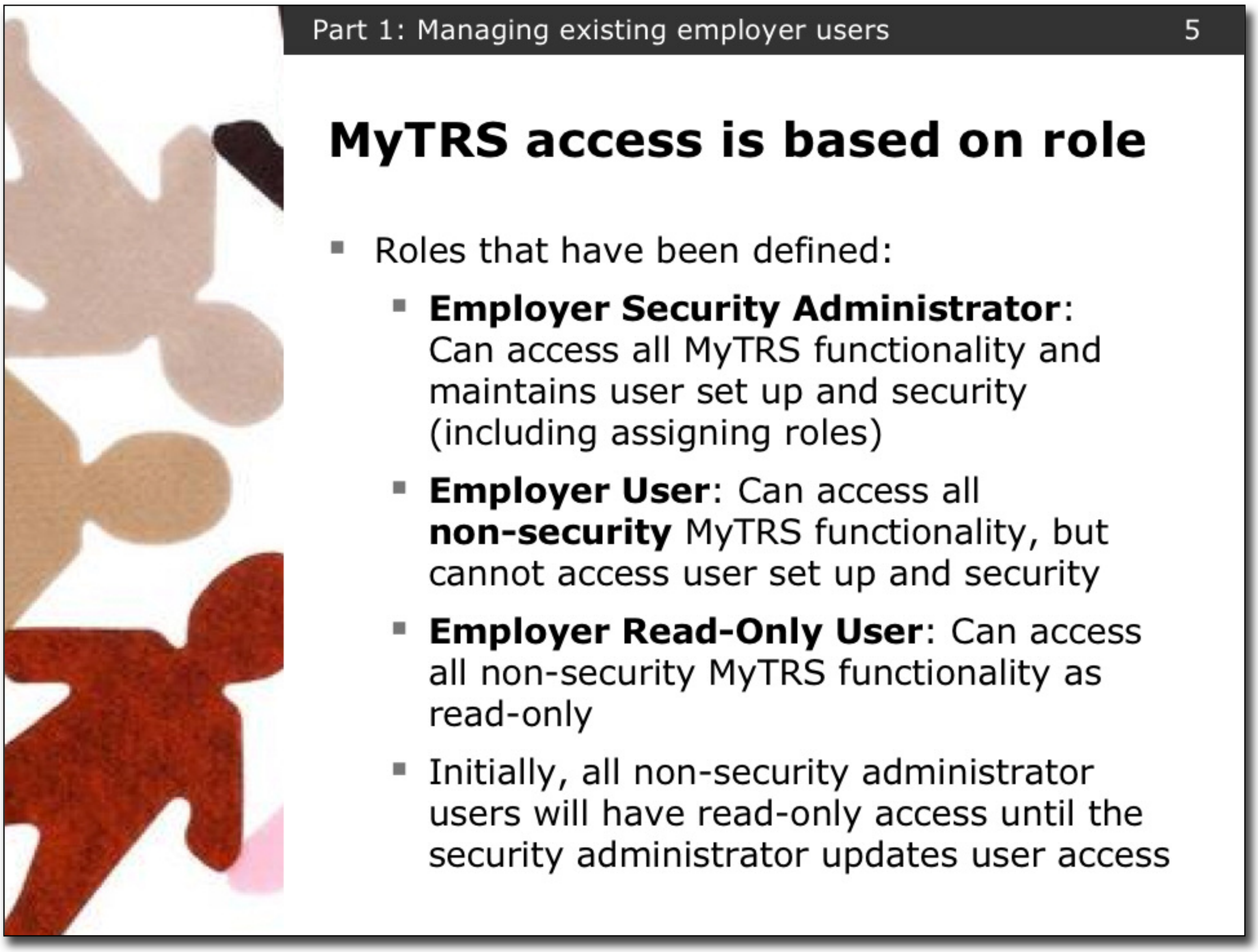
- Adding an existing MyTRS contact as a user
- Adding a new MyTRS user who is not already a contact

Part 1

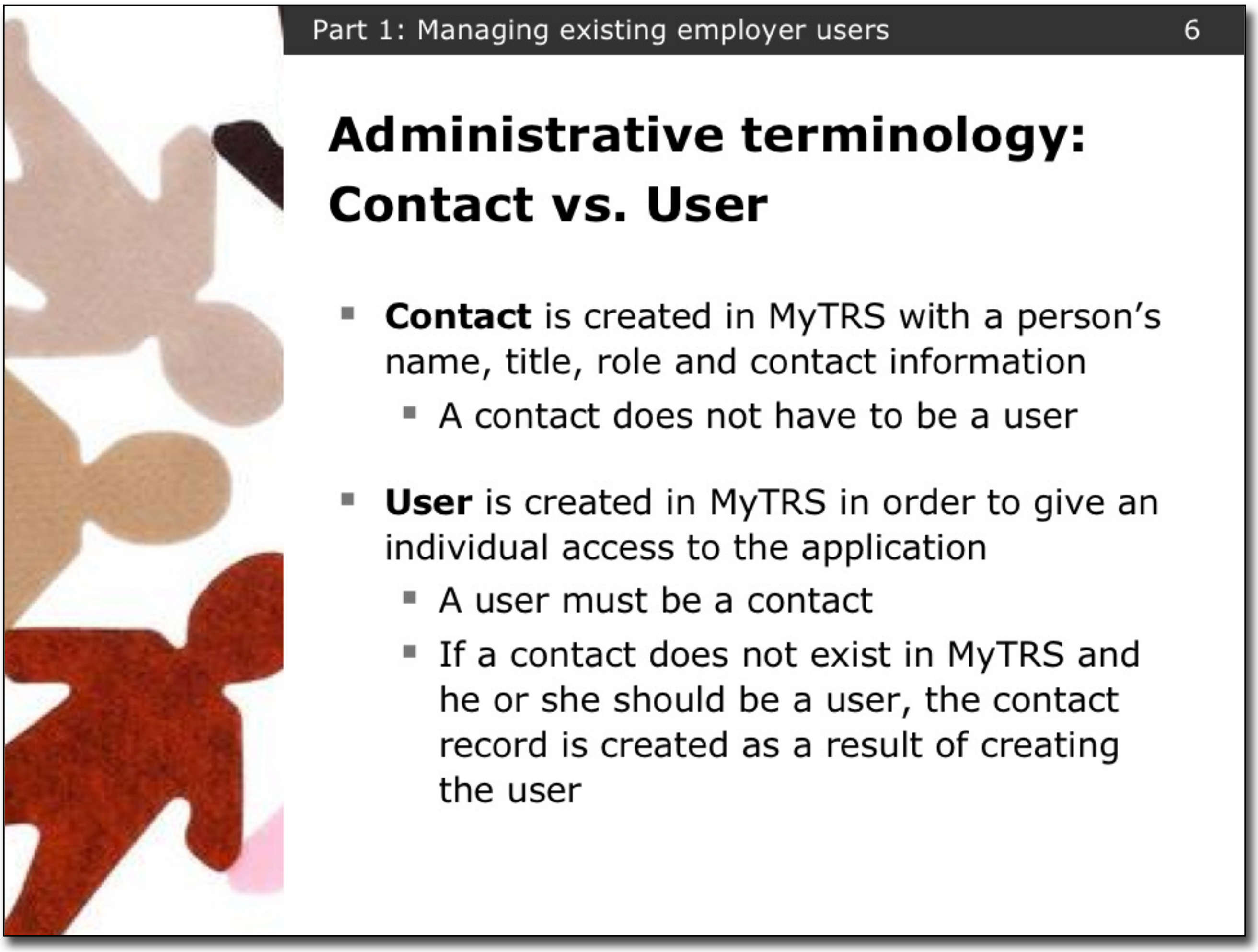
Managing existing employer users



- To make it easier for you to establish your employer contacts as users, your district's most current list of contacts has been uploaded to MyTRS.
- Accordingly, all of your employer contacts will be set up as users and will be assigned to a user group with read-only access. You will have to decide if they should have additional access rights and update MyTRS accordingly.
- Initially all users will have **no** access to MyTRS as their accounts will be "suspended."
- To grant your users access, you must "unsuspend" their accounts and update their access rights.



- After you log in, your access and read/write capabilities are based on your role.
- The Security Administrator will determine each user's role and can also tailor access for individual users.

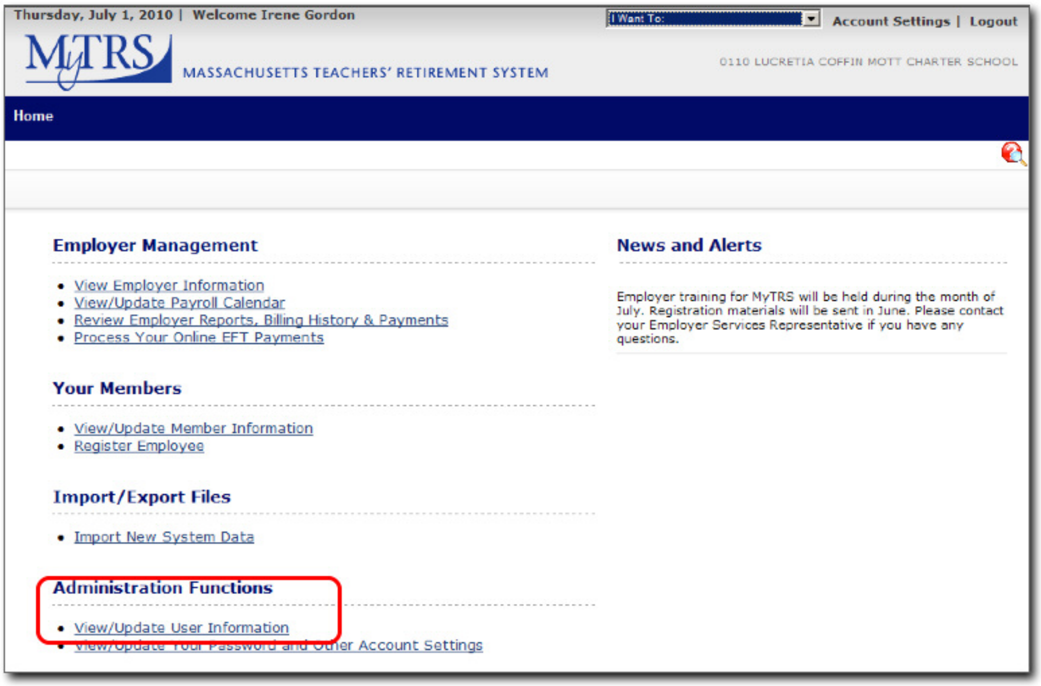


- An employer contact is someone who either works for a school district, or is involved in its reporting of MTRS deduction data. If a contact has permission to access MyTRS, he or she is also an employer user. Employer users manage their employees' MyTRS data by:
  - updating member event information,
  - importing and submitting deduction report files to the MTRS,
  - registering new employees with the MTRS,
  - generating and assigning payments, and
  - maintaining user access to MyTRS (security administrators).

Part 1: Managing existing employer users 7

View/Update user information

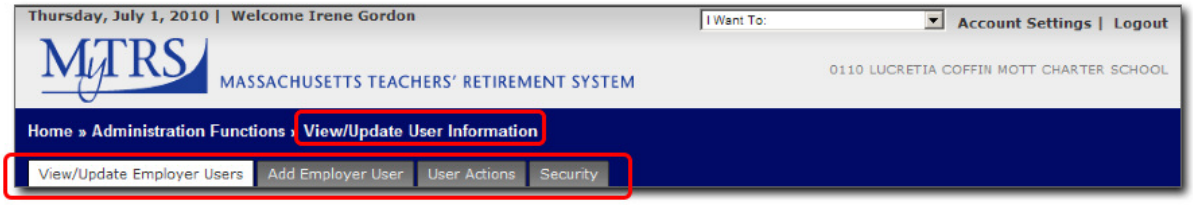
- Click **View/Update User Information** on the *Home* page



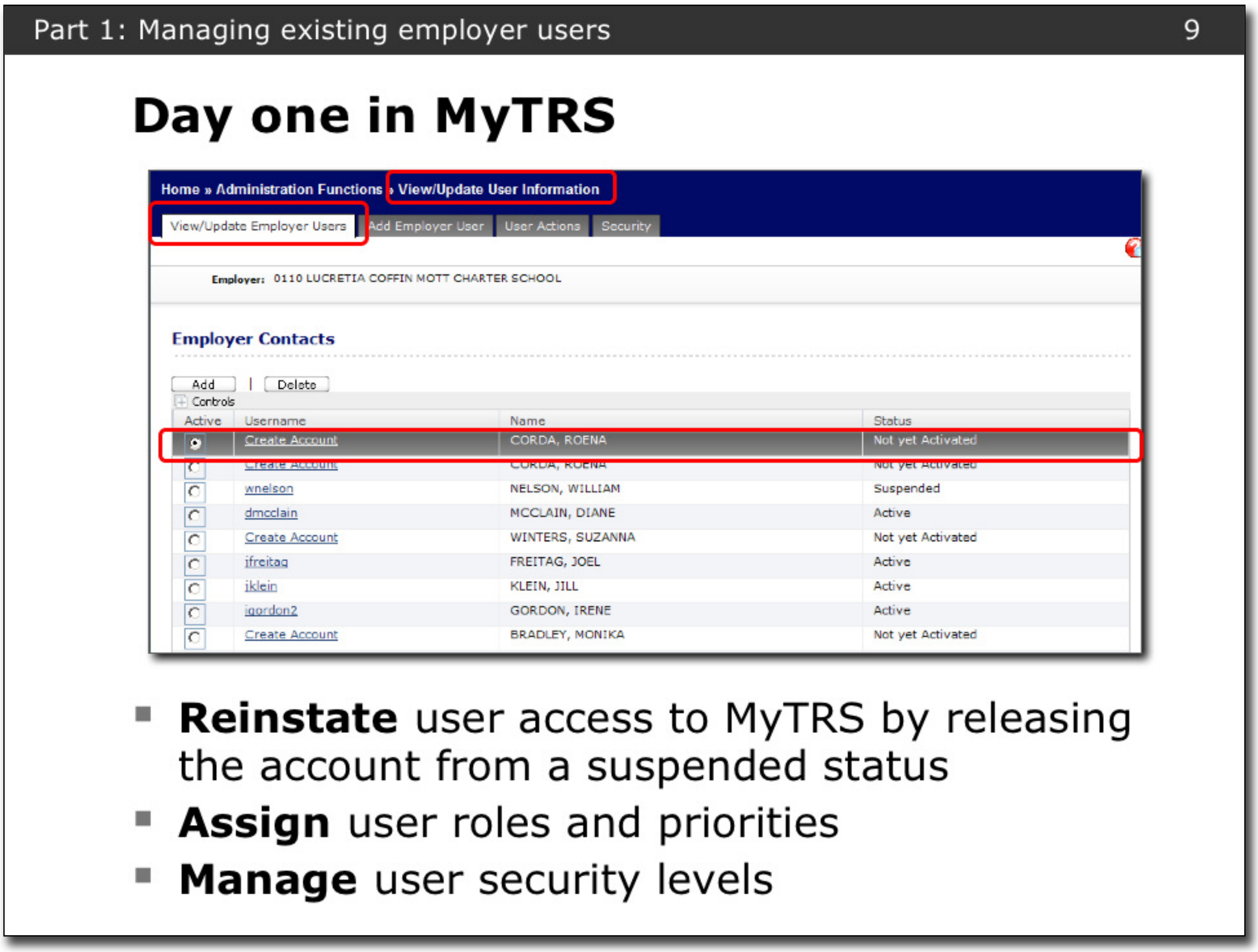
- We will review the security administrator functions that are performed from the **View/Update User Information** link located under the Administration Functions category on the MyTRS *Home* page.
- The **View/Update User Information** link is only available to security administrators.
- Using the security functionality, security administrators maintain MyTRS user profiles and user access rights.

Part 1: Managing existing employer users 8

View/Update user information



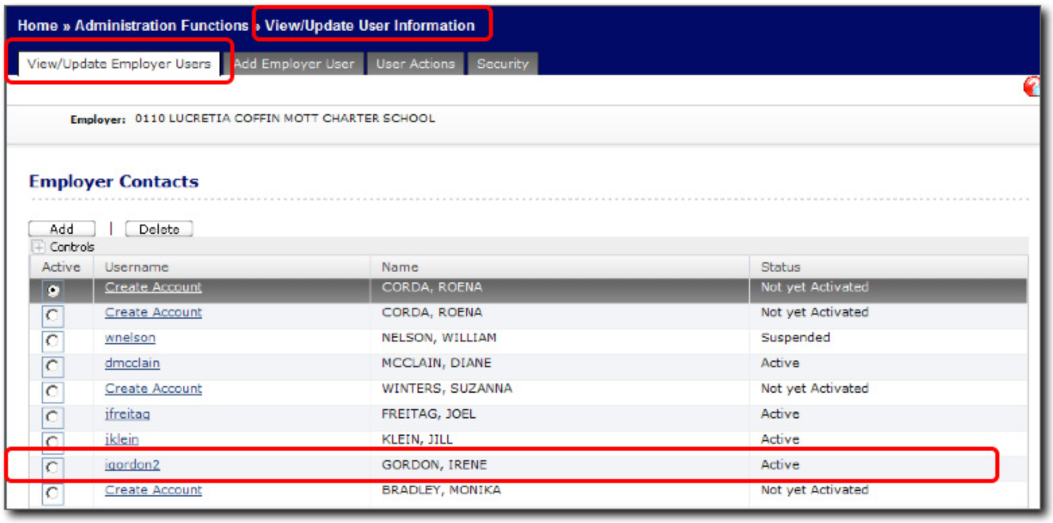
- Four tabs:
  - **View/Update Employer Users**: launching point for adding/maintaining users
  - **Add Employer User**: establishing access for users
  - **User Actions**
  - **Security**: granting read and write access to users



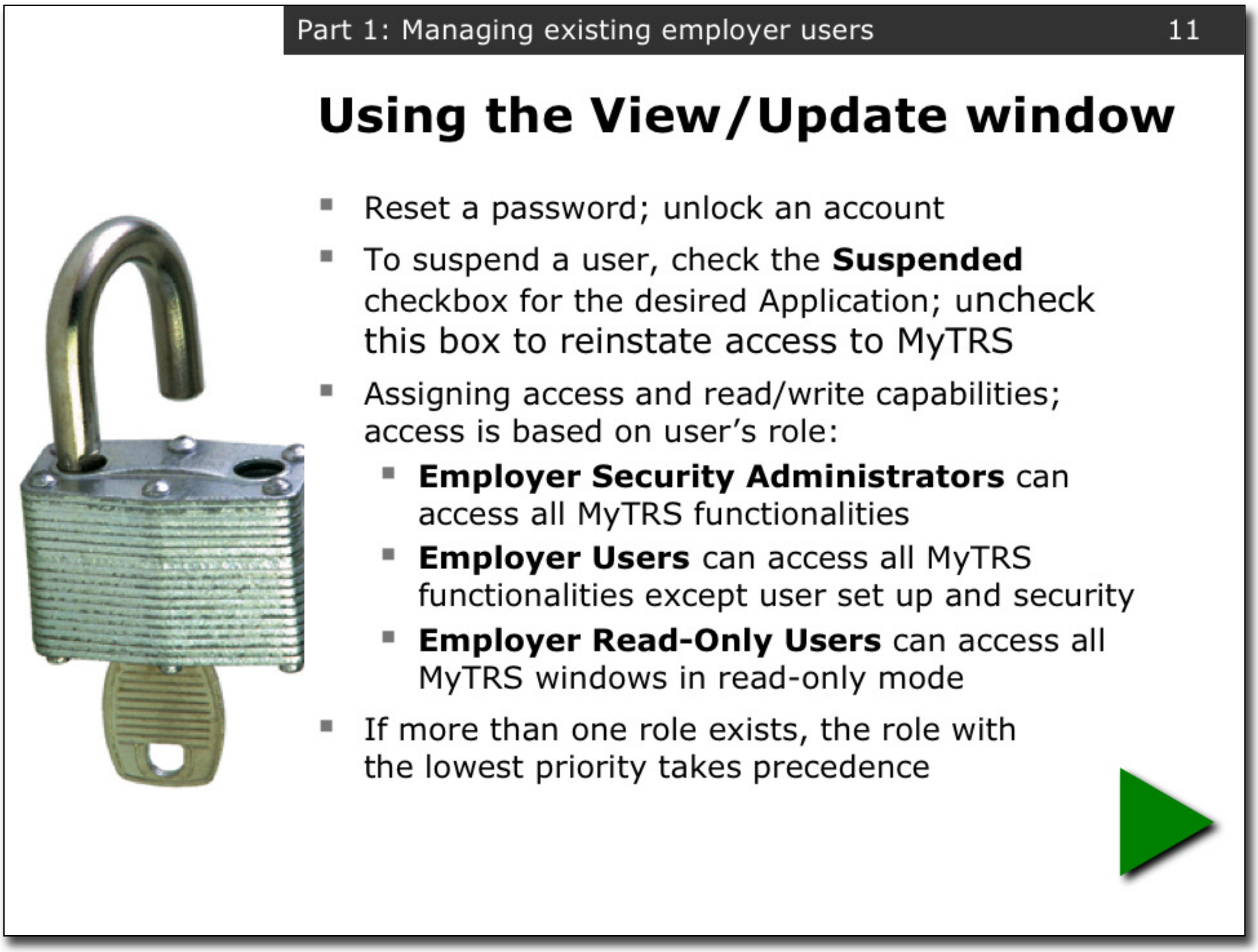
- Navigate to the **View/Update User Information** window, and click the Username in the Employer Contacts section.

Part 1: Managing existing employer users 10

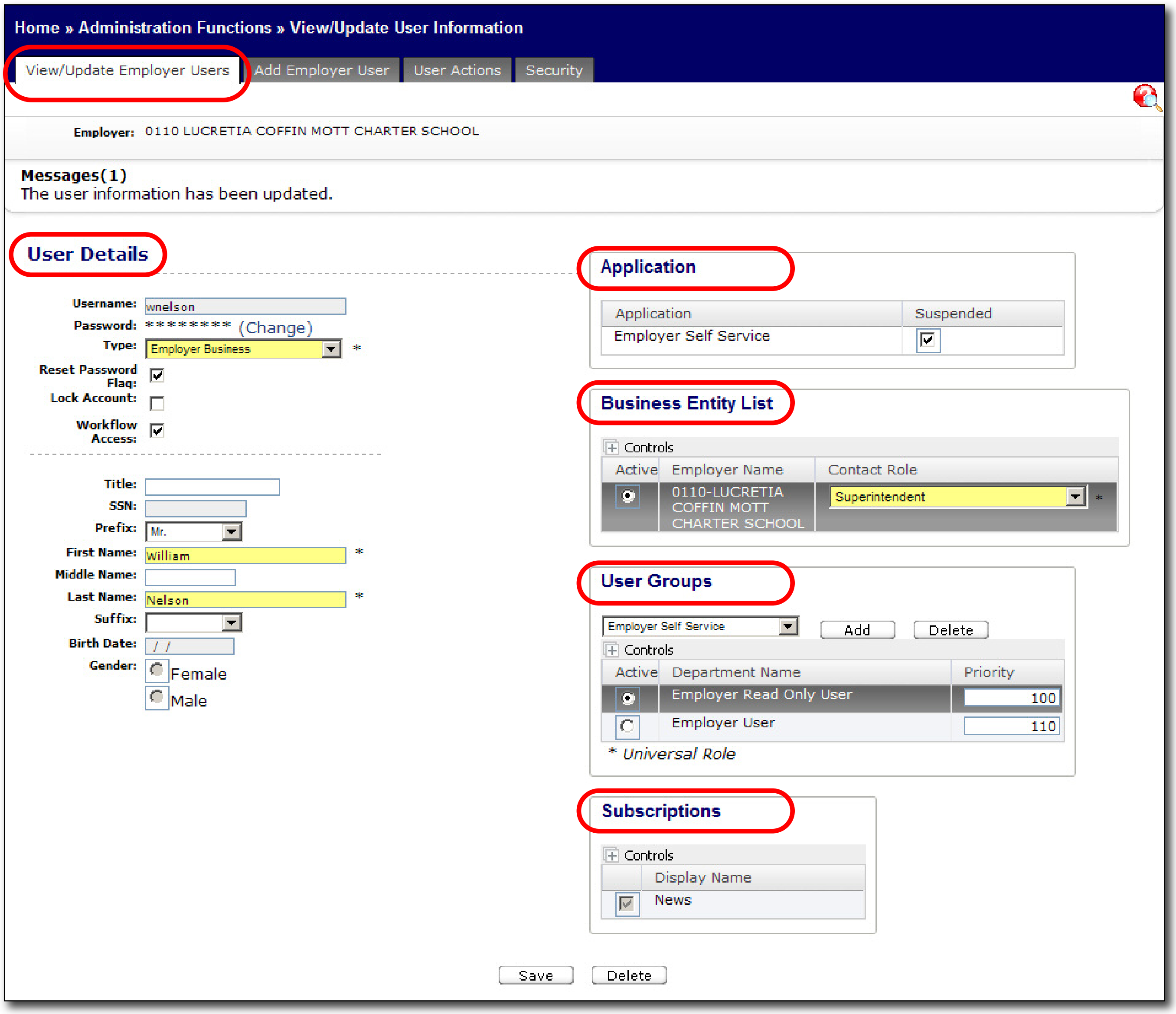
Maintaining employer user information



- Changing a user password
- Unlocking a locked account
- Suspending (reinstating) user access to MyTRS
- Assigning user roles and priorities
- Managing user security levels



- The security administrator resets a user's password when the user does not know his or her username and e-mail address associated with the account.
  - Click **Change** to display the New Password and Confirm New Password fields.
  - Check the Reset Password checkbox to require the user to create a new password the next time he or she logs in to MyTRS.
- The user's account will lock automatically after three failed attempts to log in to MyTRS. Deselect the Lock Account checkbox to unlock the account.
- The security administrator can suspend the user's access to MyTRS by checking the Suspended checkbox for the Employer Self Service application in the Application section. The user is prevented from logging in to MyTRS until the Suspended checkbox is cleared.
- Check or uncheck the Suspended checkbox and click **Save**.
- A user's access is controlled by their role and the priority level associated with the role. In the example above, Employer User would take precedence over Employer Administrator.
- The role with the lowest priority number controls a user's access.

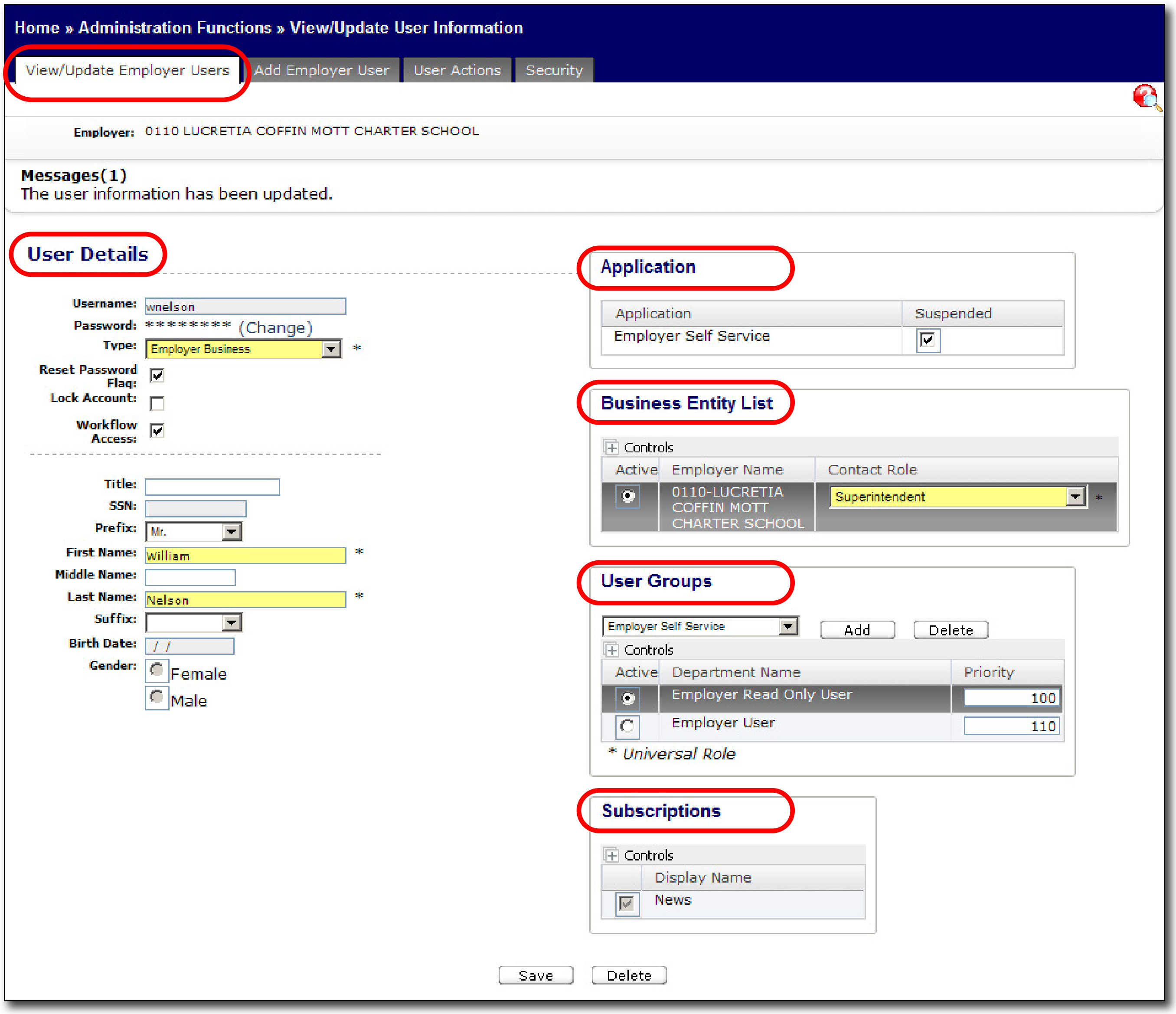


- The window displays the selected user's information. The **View/Update Employer Users** window contains the following sections:
  - **User Details**: Username, password, first name and last name of the user are maintained in this section.
  - **Application**: For MyTRS users ,the application is always Employer Self Service.
  - **Business Entity List**: The employer whose records this user can access.
  - **User Groups**: User roles are defined here (e.g., Employer User, Employer Administrator).
  - **Subscriptions**: This field cannot be edited by an employer
- To allow the user to access MyTRS for the first time, the security administrator will have to uncheck the Suspended checkbox and determine the user groups for this user (i.e., user role).

Demonstration 1

Maintaining existing users

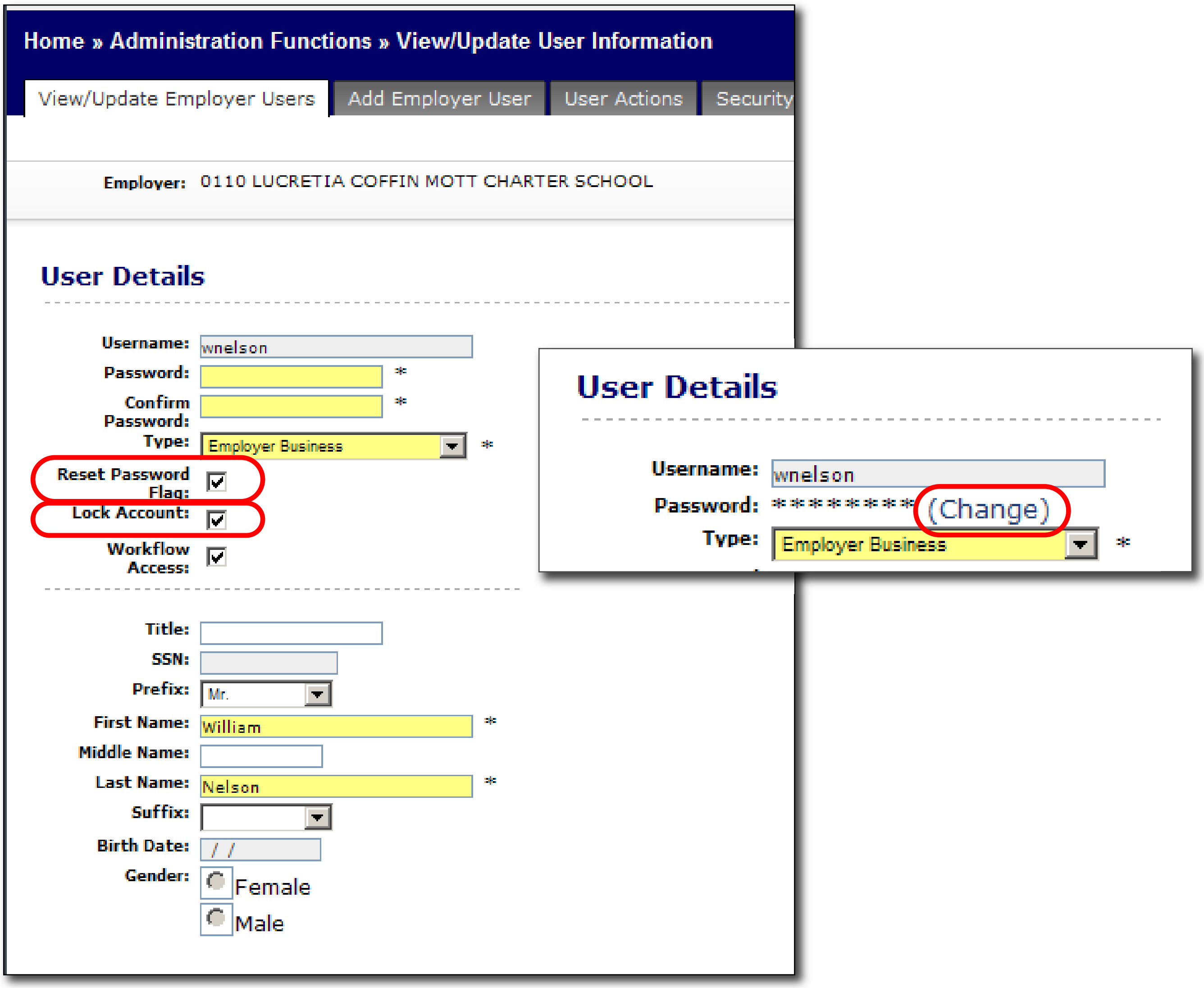
Step 1: Viewing and updating user account.



- For each of your users:
  - Uncheck the Suspended box in the Application section.
  - Review the user's role. If the person…
    - Should have read-only access-do nothing.
    - Should have the role of Employer User, change the priority on the Employer User line to a number lower than the Read Only user role. In this example change the employer user priority to 90.
- Determine if there are any additional security settings you would like to establish for each user.

Demonstration 1: Maintaining existing users (continued)

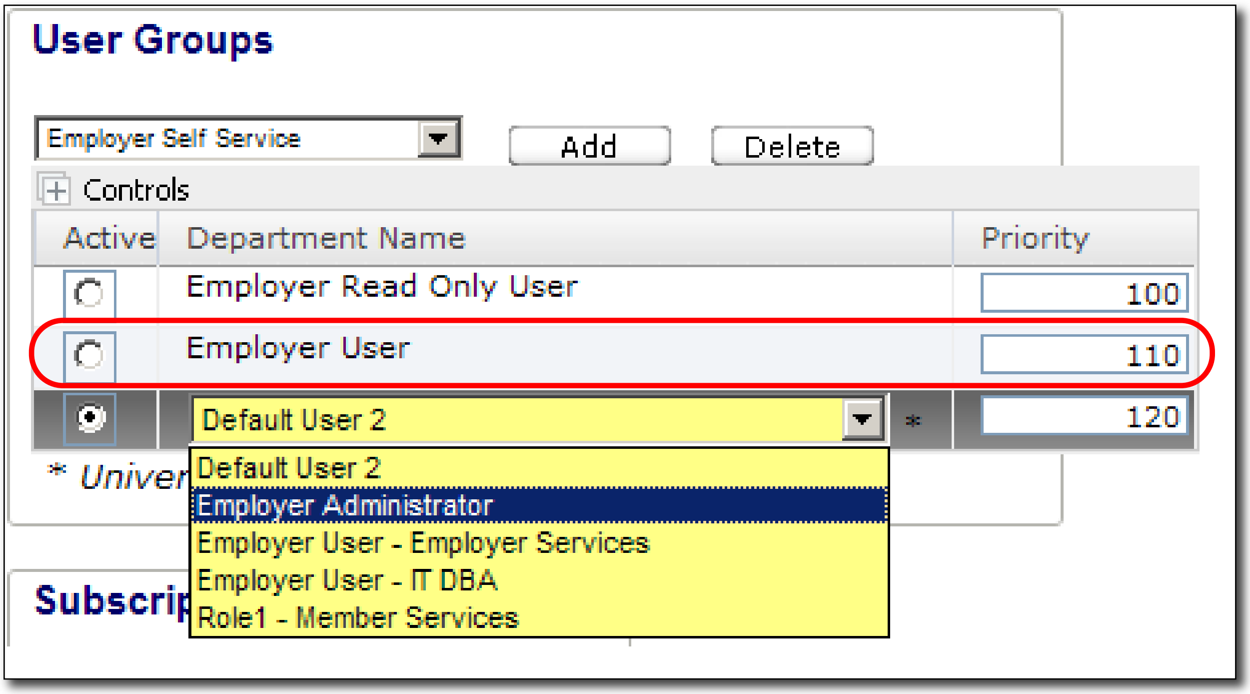
Step 2: Resetting a password and unlocking an account.



- The security administrator resets a user's password when the user does not know the username and e-mail address associated with his or her account.
  - Click Change to display the New Password and Confirm New Password fields.
  - Check the Reset Password checkbox to require the user to create a new password the next time he or she logs in to MyTRS.
- The user's account will lock automatically after three failed attempts to log in to MyTRS. To unlock the account, deselect the Lock Account checkbox.

Demonstration 1: Maintaining existing users (continued)

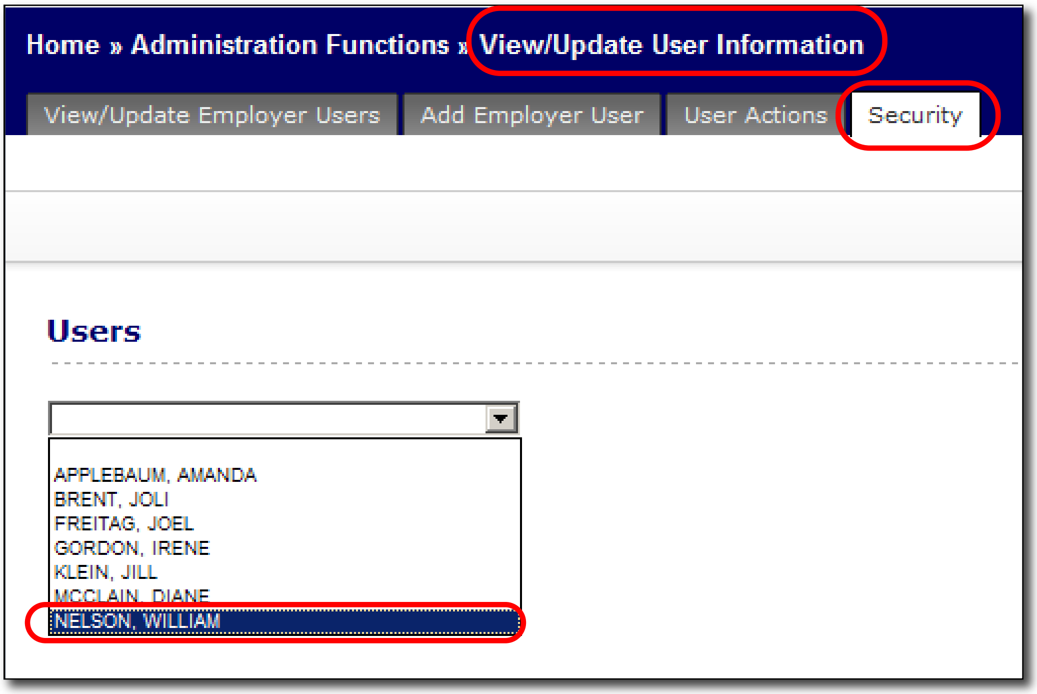
Step 3: Assigning user roles and priorities.



- Access and read/write capabilities are based on the user's role:
  - **Employer Security Administrators** can access all MyTRS functionality.
  - **Employer Users** can access all MyTRS functionality except user set up and security.
  - **Employer Read-Only Users** can access all MyTRS windows in read-only mode.
- The role with the **lowest** priority number controls a user's access, and, if a particular user has more than one role, his or her access will be based on the role with the lowest priority number.
- A user's access is controlled by his or her role and the priority level associated with the role. In the example above, Employer User (with a priority number of 110) would take precedence over Employer Administrator (priority number 120).

Demonstration 1: Maintaining existing users (continued)

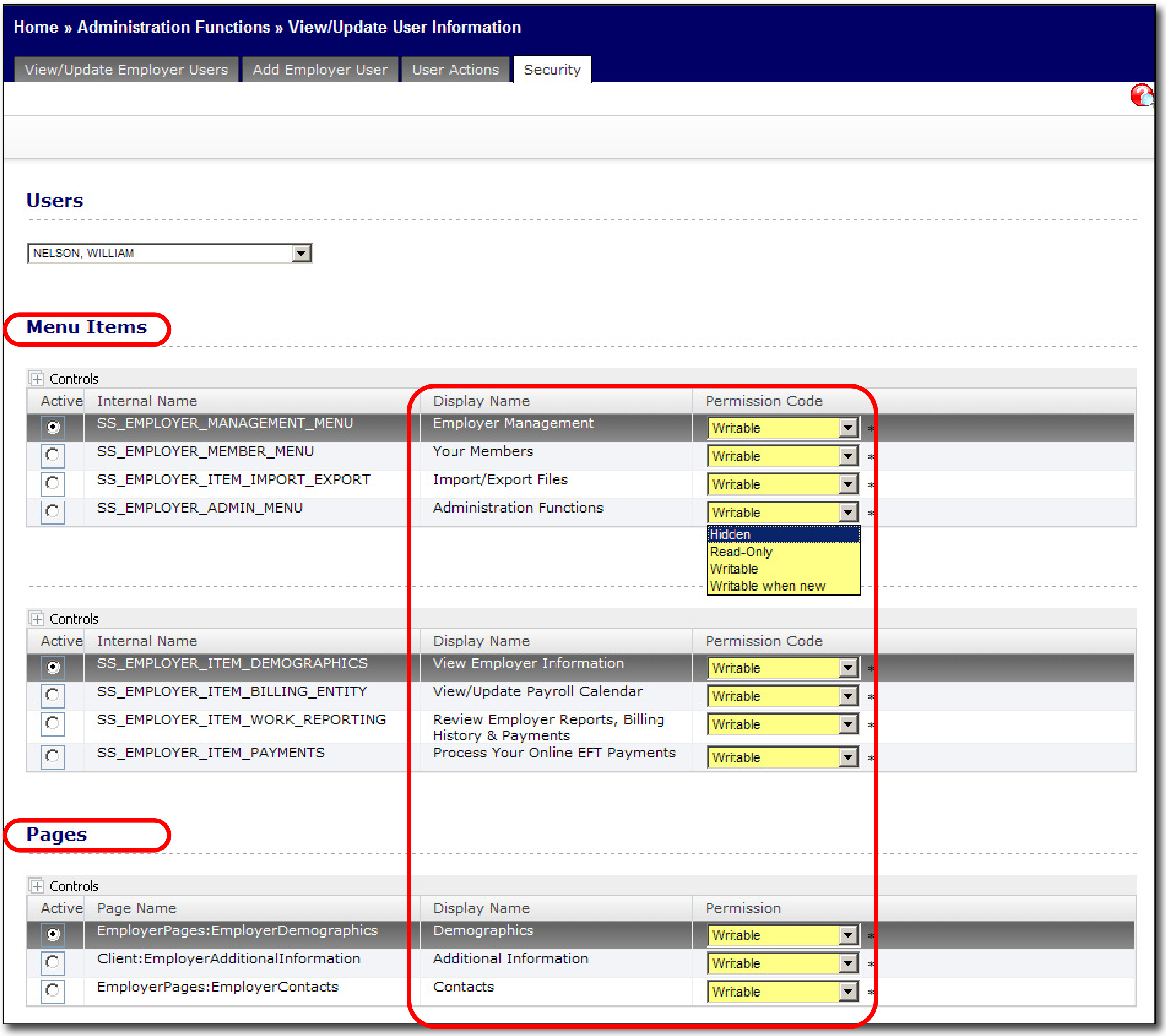
Step 4: Additional security: Selecting a user.



- Navigate to View/Update User Information > Security.
- Use the pull-down menu and select the user.

Demonstration 1: Maintaining existing users (continued)

Step 5: Additional security: Selecting permissions.



- Select the permission codes for the menu, window and page.
- Click **Save**.

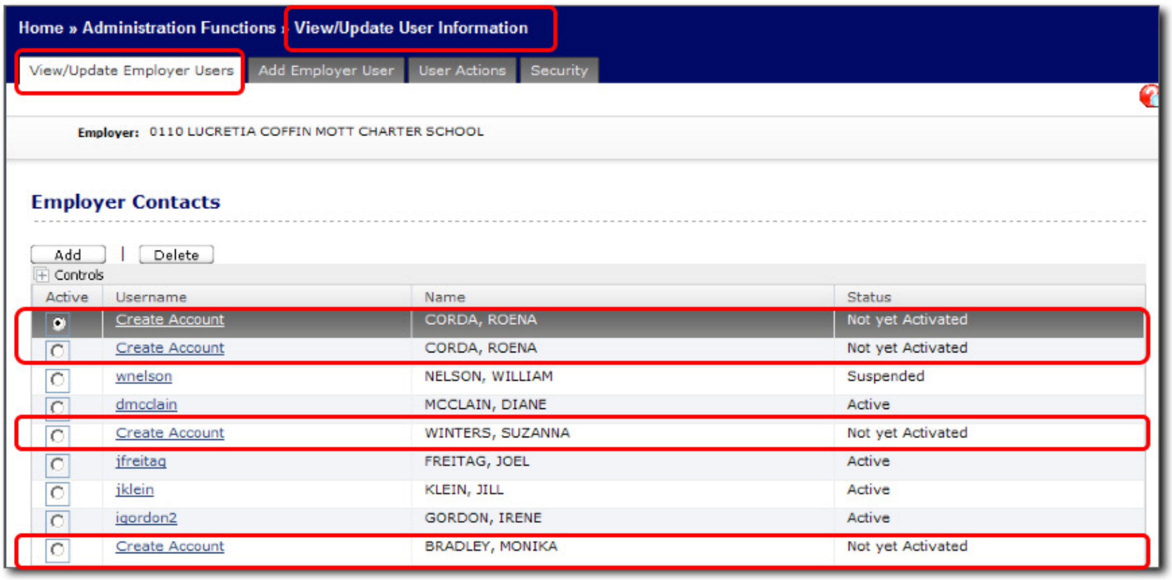
Notes

Part 2

Adding new employer users

Part 2: Adding new employer users 14

Adding an existing contact as a user

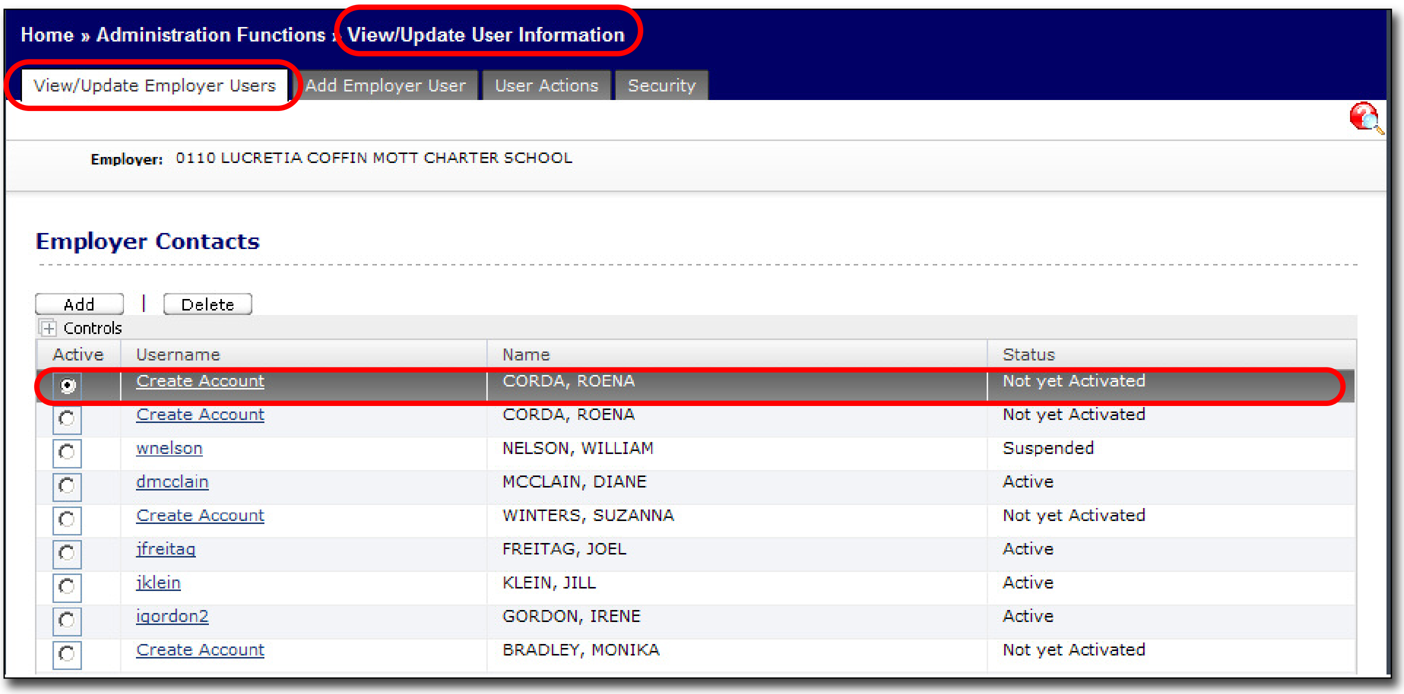


- View/Update User Information: Launching point for adding and maintaining users
  - All of the employer contacts are listed on this window
  - To add an existing contact look for the Create Account link

Demonstration 2

Adding an existing contact as a user

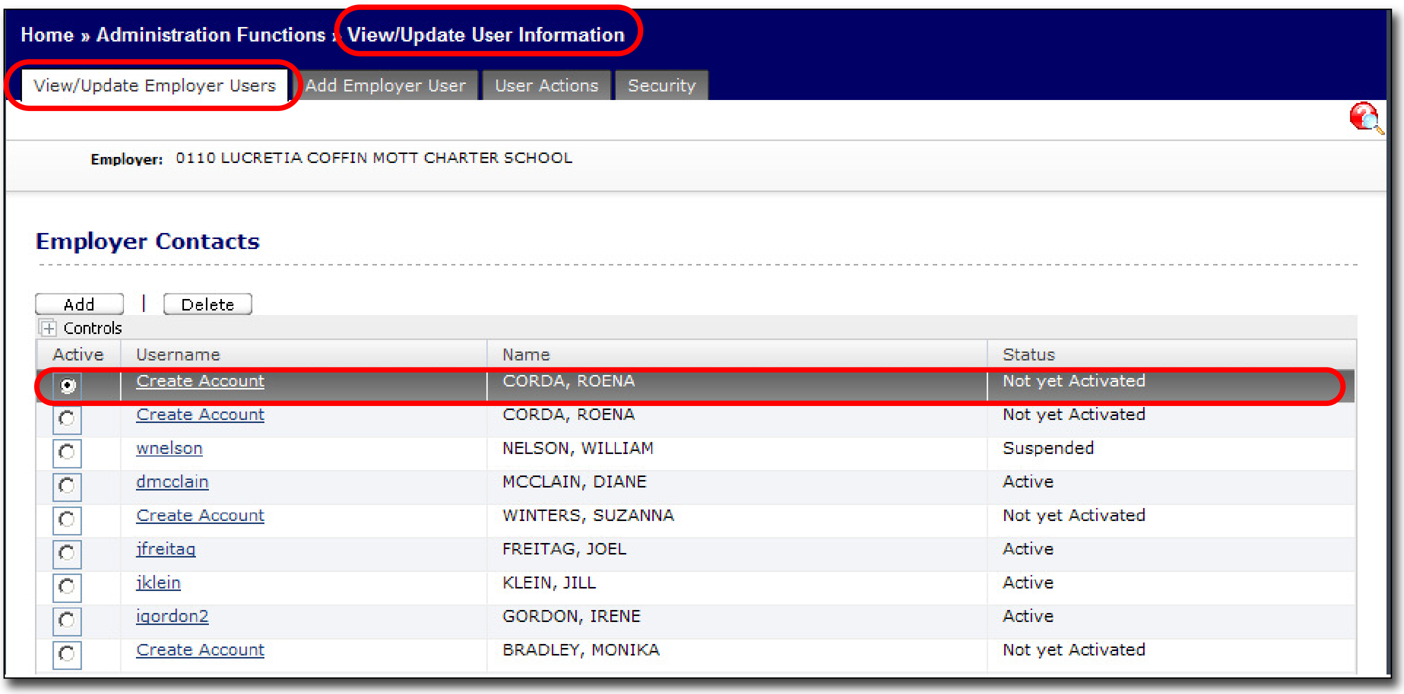
Step 1: Identify the existing contact.



- Contacts become MyTRS users when the security administrator creates a user account. To create a user account, you follow a four-step process:
  - Select a contact with the **Create Account** link in the username.
  - Add employer user.
  - Set up user actions.
  - Establish security.
- For each employer contact, the following information displays:
  - The username, or the MyTRS login identification
  - "Create Account" if the contact does not have a MyTRS username.
  - The name of the employer's contact
  - The Member Status which indicates whether the contact can access MyTRS:
    - **Active**: the contact is a MyTRS user.
    - **Inactive**: the contact is a MyTRS user, but access to MyTRS is no longer available.
    - **Not Yet Activated**: the contact does not have access to MyTRS as a user.
    - **Suspended**: the contact is a user, but access to MyTRS is currently suspended.

Demonstration 2: Adding an existing contact as a user (continued)

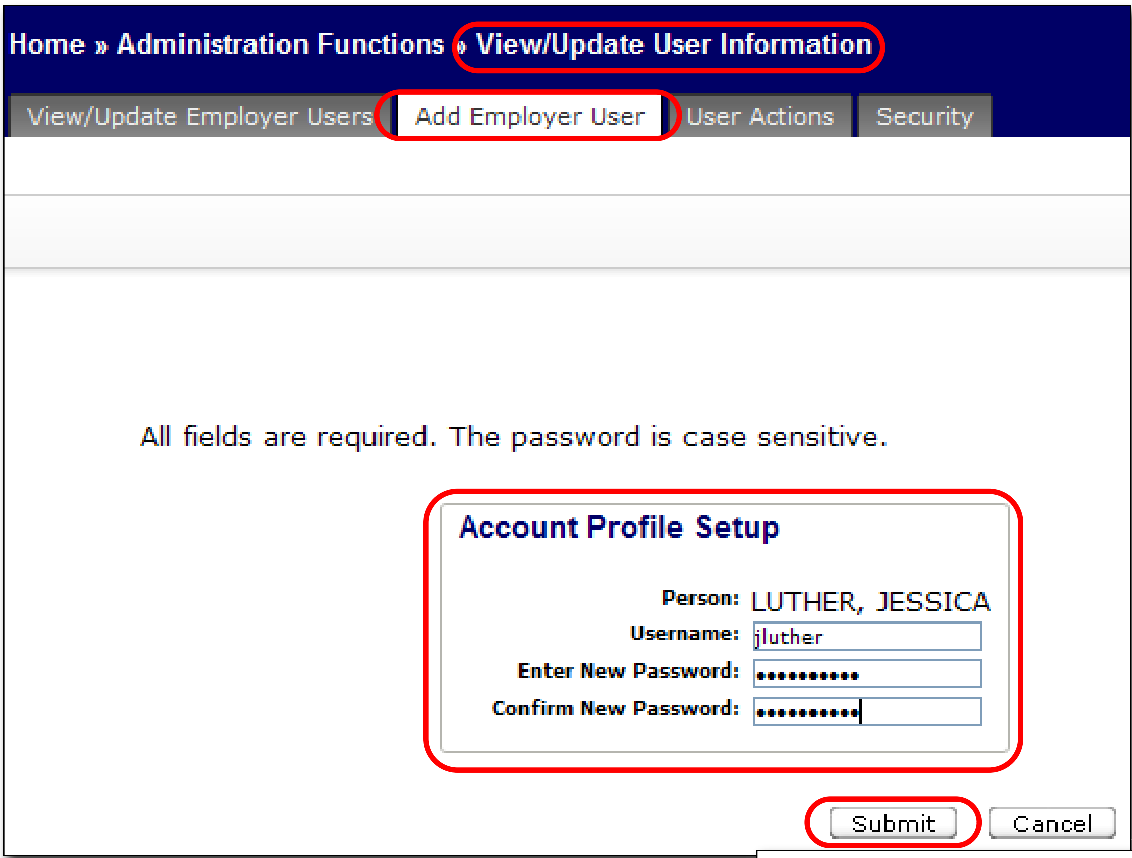
Step 2: Create a user account.

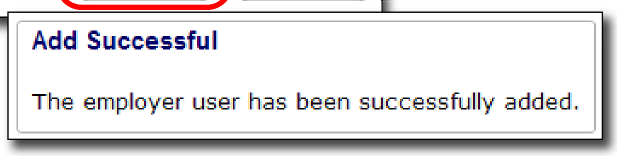


- To initiate the process of adding a new user who is already a MyTRS contact, click **Create Account**. The *Add Employer User* window will appear.
- The *View/Update Employer User* window is used to activate an employer user's account for an existing contact and to create new user accounts.

Demonstration 2: Adding an existing contact as a user (continued)

Step 3: Add the employer user.

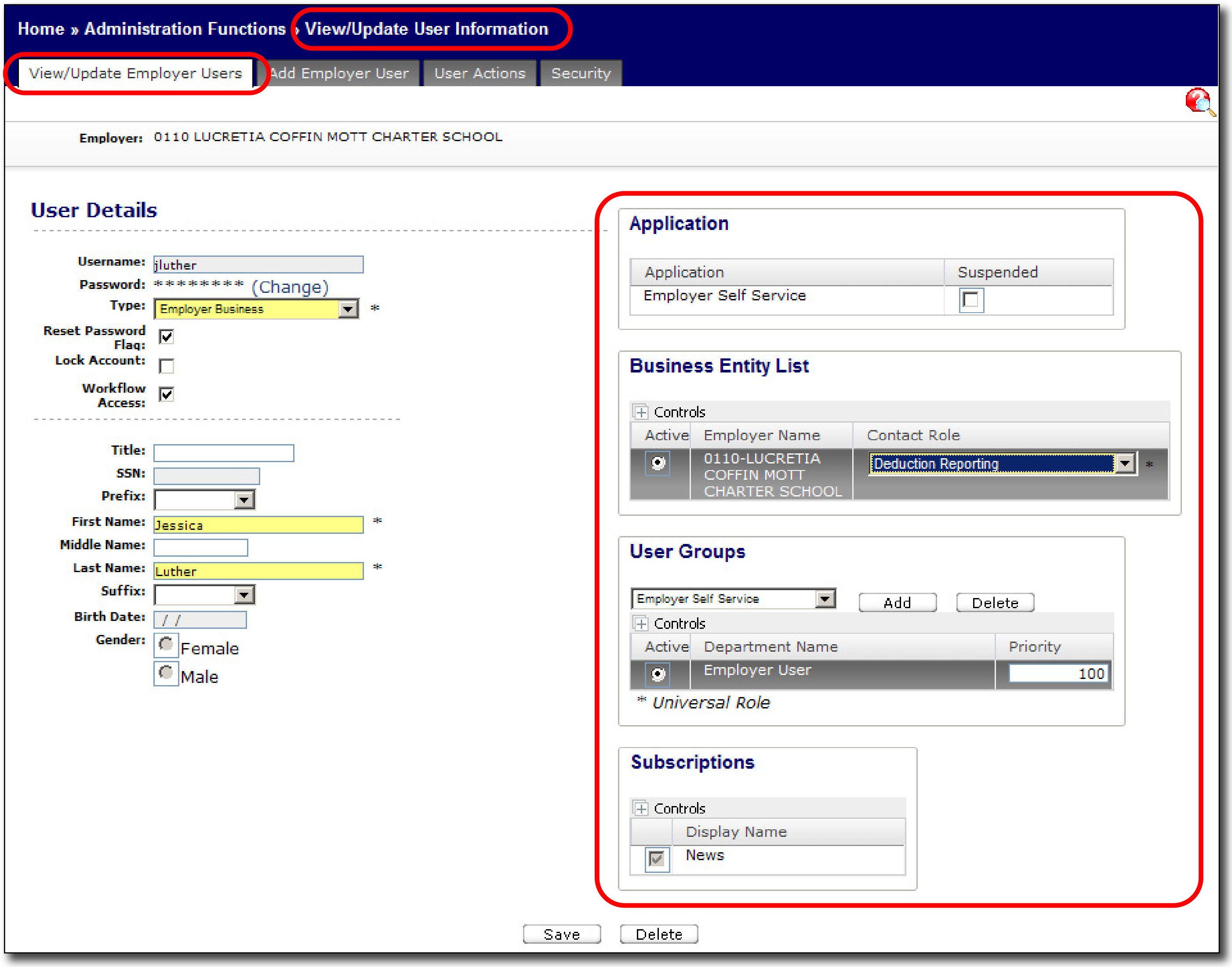




- Enter username (e.g., first name initial + last name)
- Create a default initial password
- Clicking the **Create Account** link for a contact opens the Add Employer User window. You will be prompted to fill out the following fields:
  - **Username**: The unique identification created by the employer's security administrator. The suggested format is the first initial of the first name and the full last name (e.g., Lisa R Rose is lrose). If the username already exists, try using the first initial of the first name + middle initial + full last name (e.g., Lisa R Rose is lrrose), or a number after the username (e.g., lrose2).
  - **Enter New Password**: Enter the default password for the user. Passwords must meet MyTRS requirements.
  - **Confirm New Password**: Re-enter the password to verify and confirm the entry.
- Click **Submit**. A message will appear to indicate that the user has been added, and the User Actions window will then open (see next step).

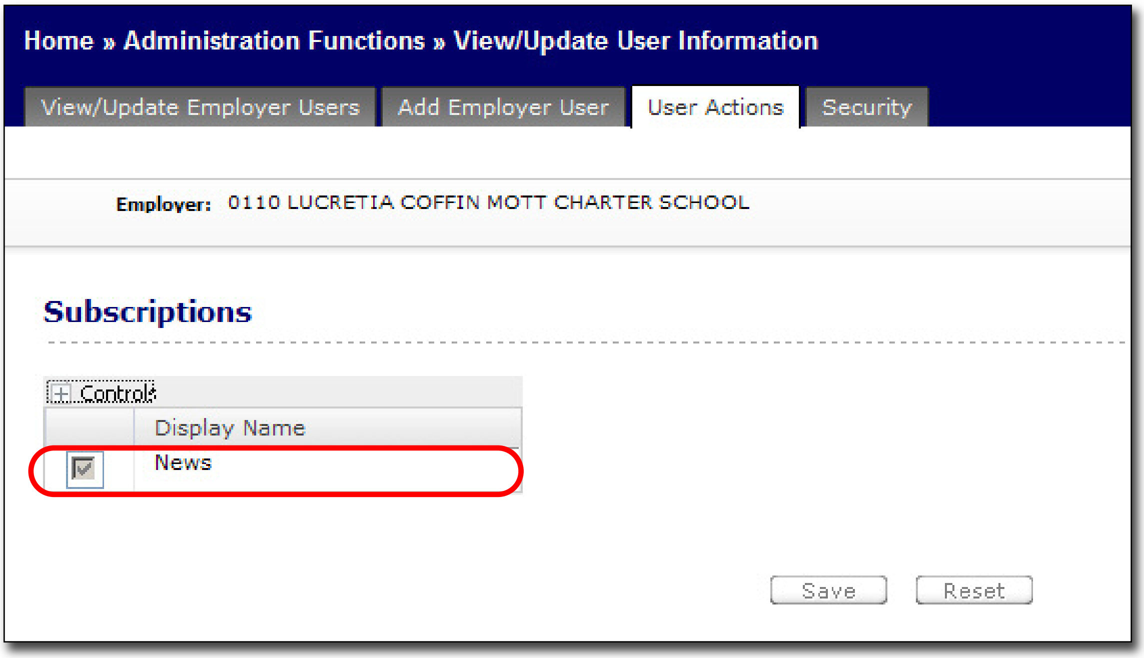
Demonstration 2: Adding an existing contact as a user (continued)

Step 4: Checking user access information.



Demonstration 2: Adding an existing contact as a user (continued)

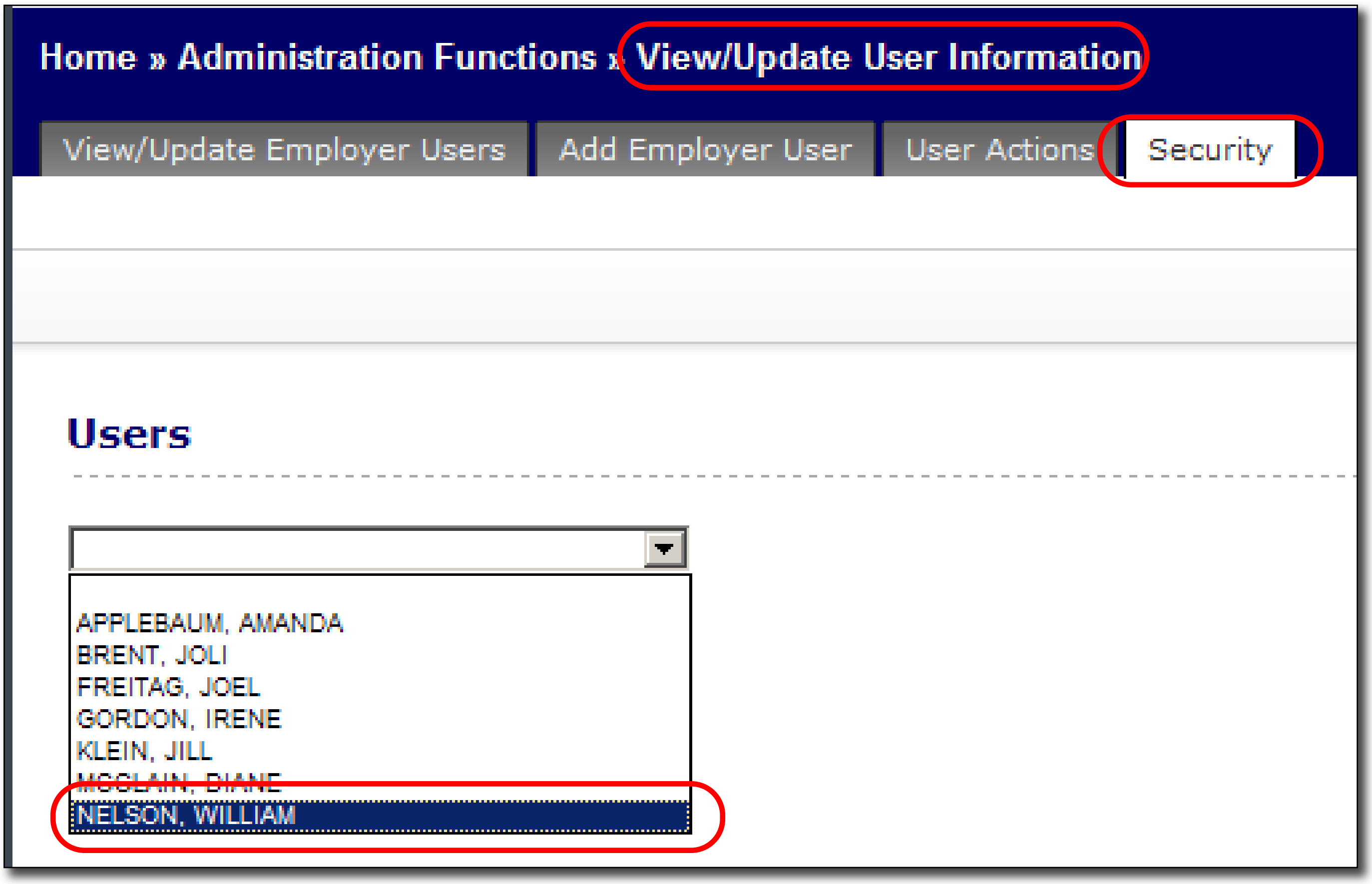
Step 5: Review the Subscriptions setting.



- The User Actions window displays the subscriptions for the employer user.
- At this time, this window is view-only for all employer users, and News is the only subscription available.
- By default, all employer users have access to the News subscription and the checkbox should already be checked for all users. However, the security administrator should ensure this checkbox is checked.
- Click **Save**. The Users list on the Security window will open. Select the user to proceed to set up access rights for the user (see next step).

Demonstration 2: Adding an existing contact as a user (continued)

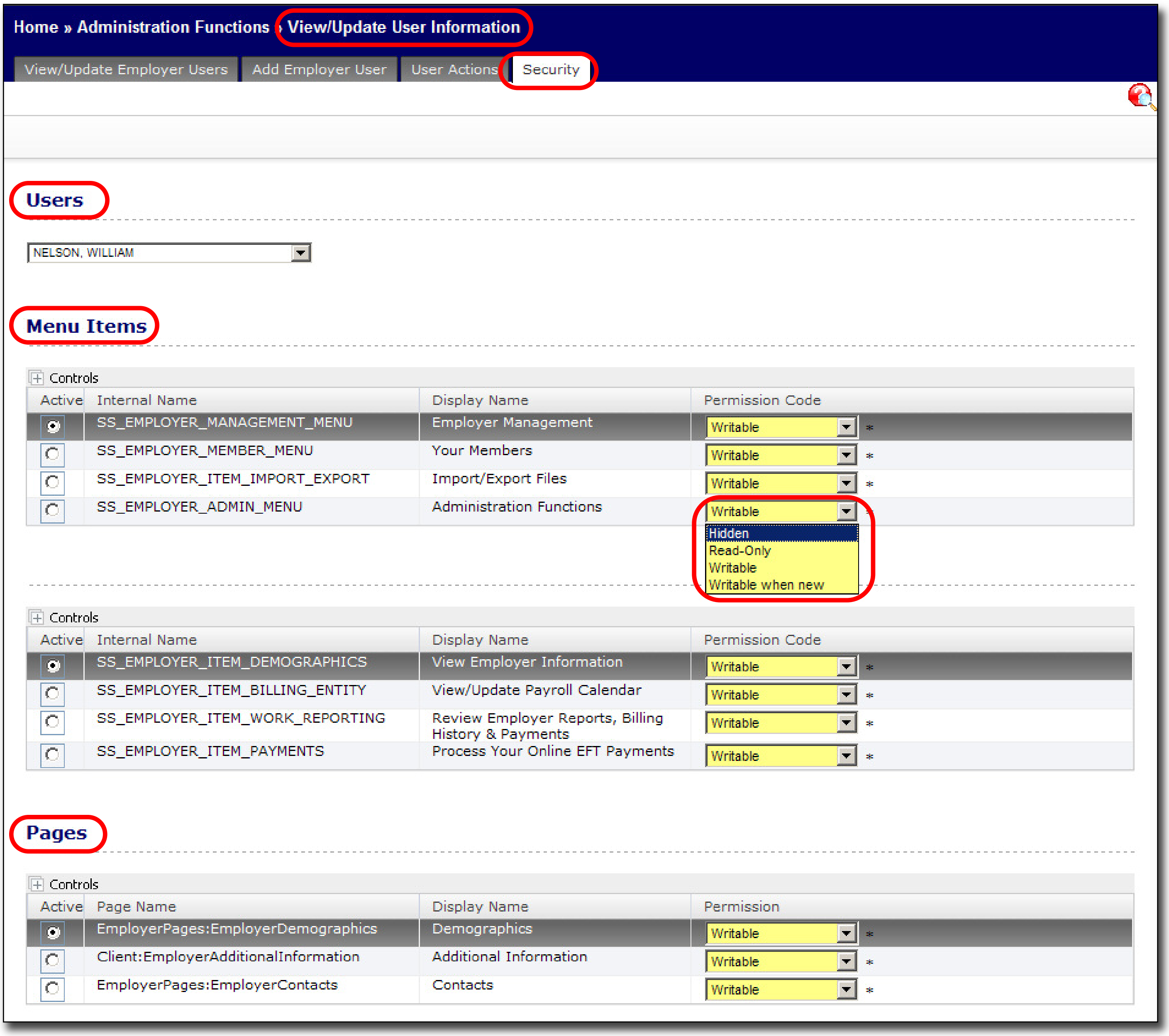
Step 6: Establish security settings.



- Select the user.

Demonstration 2: Adding an existing contact as a user (continued)

Step 7: Establish security settings (continued).



- The *Security* window refreshes and displays the user's security permissions.
- To change the permission for a menu item of a window, click the Active radio button for the window.
- Select the Permission Code from the pull-down.
- Click **Save**.
- The security permissions are updated for the user.

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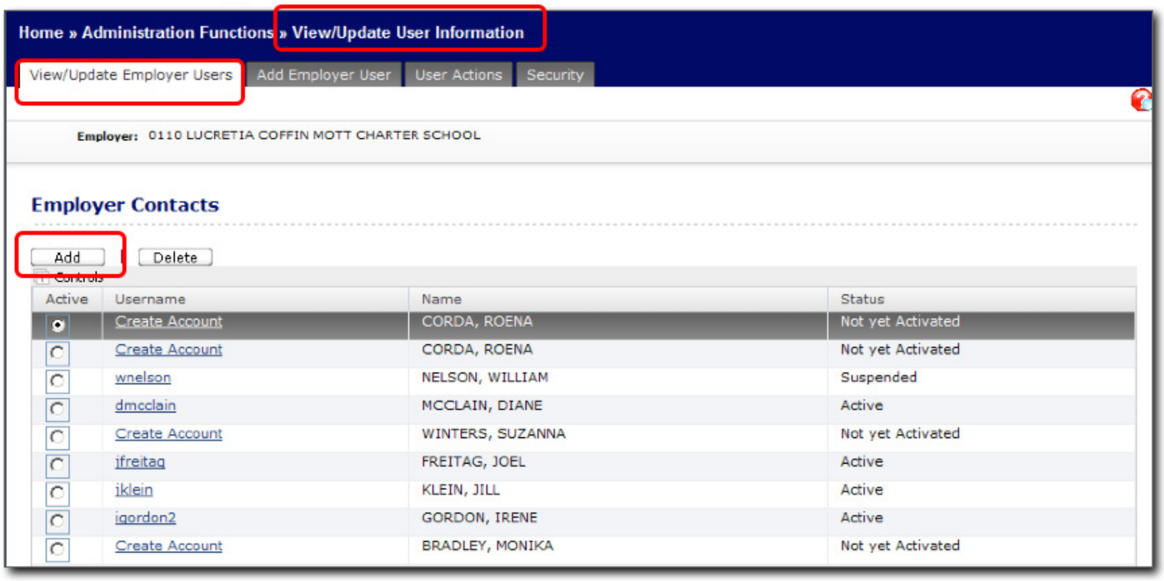
Adding a user who isn't a contact

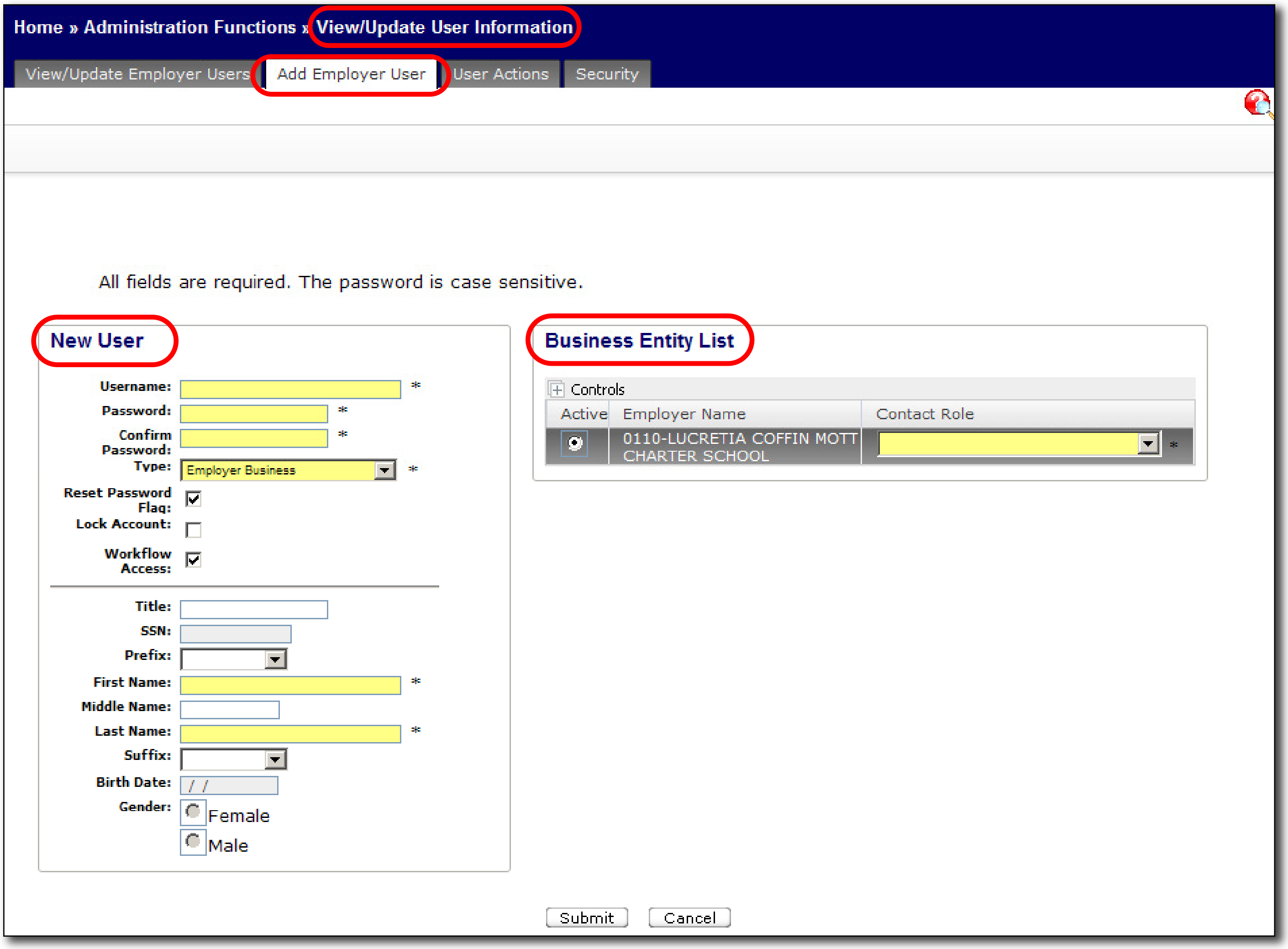


- View/Update User Information: Launching point for adding and maintaining users
  - You may need to add a user who is not a contact
  - Click on the **Add** button to initiate the process

Demonstration 3

Adding a new user who is not already a contact

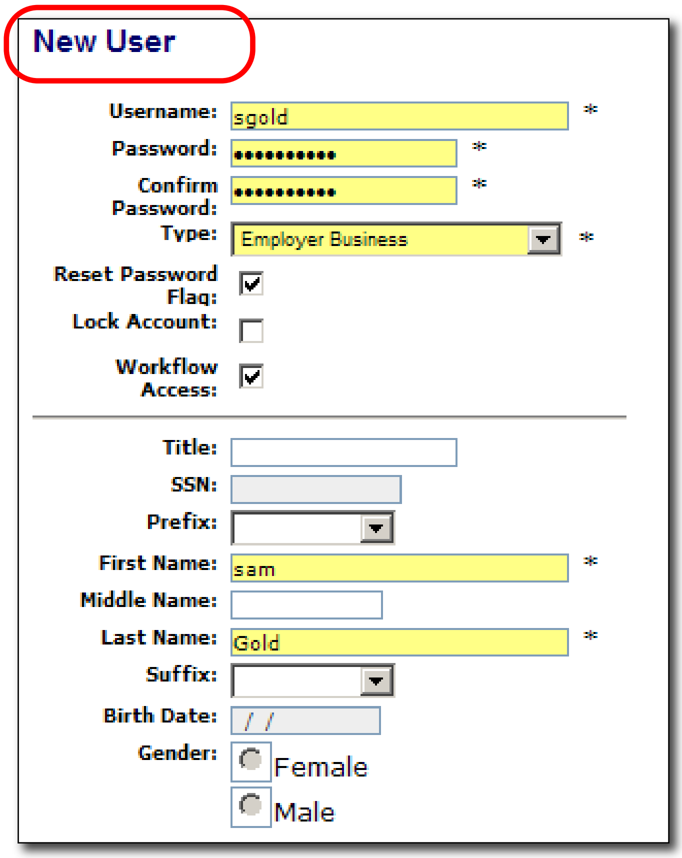
Step 1: Start at the Add Employer User window.



- To get to the Add Employer User window, go to Home > Administration Functions > View/Update User Information and click on the second tab, Add Employer User:
- There are two main sections on this window:
  - New User
  - Business Entity List
- This creates a contact profile in MyTRS.
- The security administrator must notify the MTRS to enter the remaining information for the contact record.

Demonstration 3: Adding a new user who is not already a contact (continued)

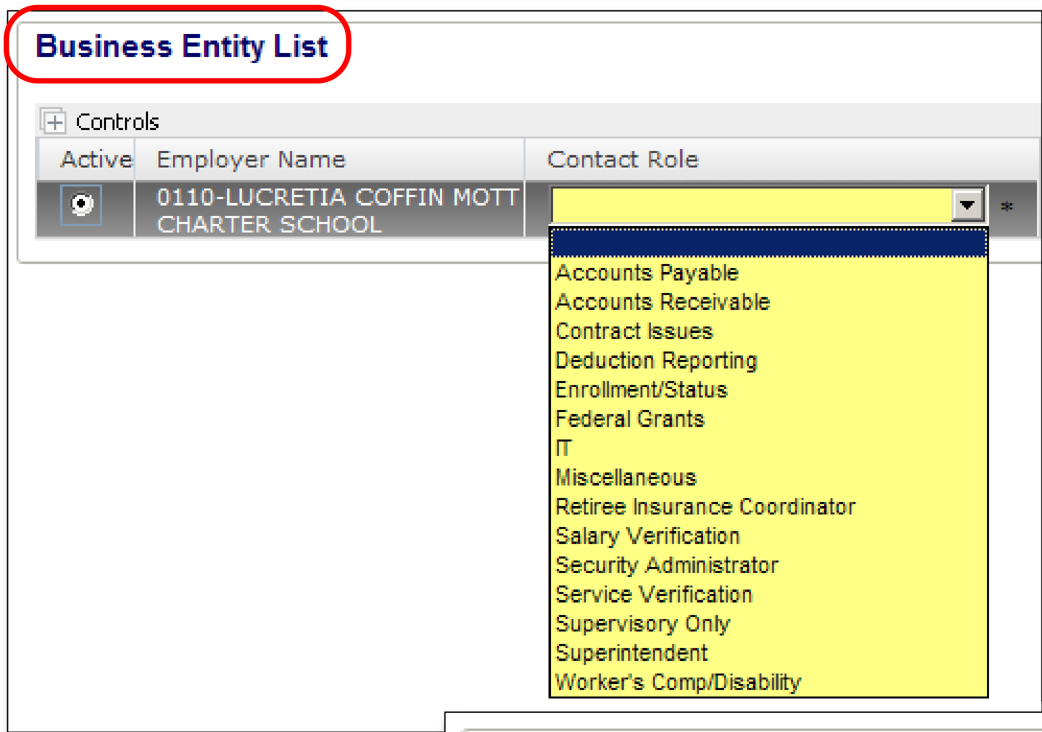
Step 2: Provide basic account info.

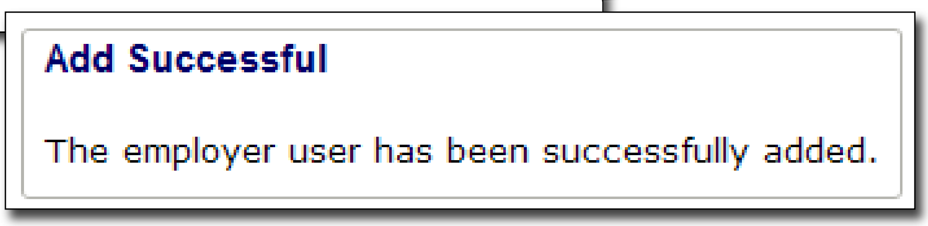


- Fill in **New User** fields following the guidelines for creating a username and password.
- The security administrator must notify the MTRS to enter the remaining information for the contact record.
- Fields in yellow and marked with an asterisk are required.
- Complete the fields in the New User section of the Add Employer User window.
- Enter a unique Username. The recommendation is the first initial and full last name (e.g., rbrown).
- Enter a default Password and retype it in the Confirm Password field. This must follow the password requirements (e.g., Password#1).
- Verify the Reset Password Flag checkbox is marked. When marked, this checkbox requires the user to change their password upon their next login.
- Select the Employer User Type from the pull-down field. The valid options for the user classification are: Employer Business and Employer Vendor.
- Enter the user's Title, Prefix, First Name, Last Name and Suffix.

Demonstration 3: Adding a new user who is not already a contact (continued)

Step 3: Complete the Business Entity List.





- Complete the Business Entity List section.
- Click **Submit**.
- A message window appears verifying the information is saved.
- You have now successfully added a user.
- Proceed to complete the Business Entity List section. Select the **Contact Role** for the user from the pull-down field (e.g., Accounts Payable).
- Click **Submit** to save the user's profile.
- A message window appears verifying the information saved and then the *View/Update Employer Users* tab automatically displays.
- Verify the new user appears in the Employer Contacts section of the *View/Update Employer Users tab.*
- You have completed adding a new employer user.


MyTRS Training
For Security Administrators
Questions?

Notes